Western Economic Diversification (WD)
Application Checklist

This checklist will guide you through the necessary steps in assessing project costs and appropriate forecasted periods to be included in your WD application. Depending on the items listed in the Project Costs, it is essential that you liaise with the appropriate units at UofA. If you have any questions about the checklist, contact your RSO Research Facilitator.

Note: Inadequate budget forecast planning, including failure to consult with appropriate UofA units, will result in potential withholding of funding instalments by WD.

**Personnel Costs**

Does your project include costs for personnel (i.e., salary + benefits)?

☐ Consult with UofA Human Resource Services (HR) and/or your department regarding development of a Job Fact Sheet, pay grade, etc.

*Failure to consult with HR will result in unanticipated delays in hiring personnel and insufficient budgeting for personnel costs.*

**Equipment Costs**

Will the project include equipment purchases?

☐ Consult with UofA Supply Management Services (SMS) (780-492-4668; customerservice@sms.ualberta.ca) to obtain information about:
  - Competitive bid process that applies to items over $75,000 CDN.
  - Estimated cost of the item, including shipping/handling and customs charges.
  - Fees associated with delivery.
  - Delivery and/or installation timelines once the item has been shipped from the vendor.

*Failure to consult with SMS will result in unexpected delays in assembly, shipping and/or delivery of equipment, potentially pushing equipment costs to the next fiscal year(s).*

**Note:** Reimbursement is only for fully functioning unit(s), not on delivery of item(s).

**Space Modification Costs**

Does your project require space modifications (construction/renovation)?

☐ Obtain confirmation from your Faculty of your research space.

☐ Consult Alex Hatch of UofA Facilities and Operations (F&O) (780-248-1008; alex.hatch@ualberta.ca) regarding scope of work and estimate.

*Failure to consult with F&O will result in delayed placement of the project into the F&O work queue, increased associated costs being incurred, and completion at a later date than anticipated.*

**RSO & UofA Website Links**

RSO Research Facilitator: [https://www.ualberta.ca/research/services/about/contact-us/research-facilitators-by-faculty](https://www.ualberta.ca/research/services/about/contact-us/research-facilitators-by-faculty)

Facilities and Operations: [https://www.ualberta.ca/vice-president-facilities-operations](https://www.ualberta.ca/vice-president-facilities-operations)
